



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MORNING BRIEF

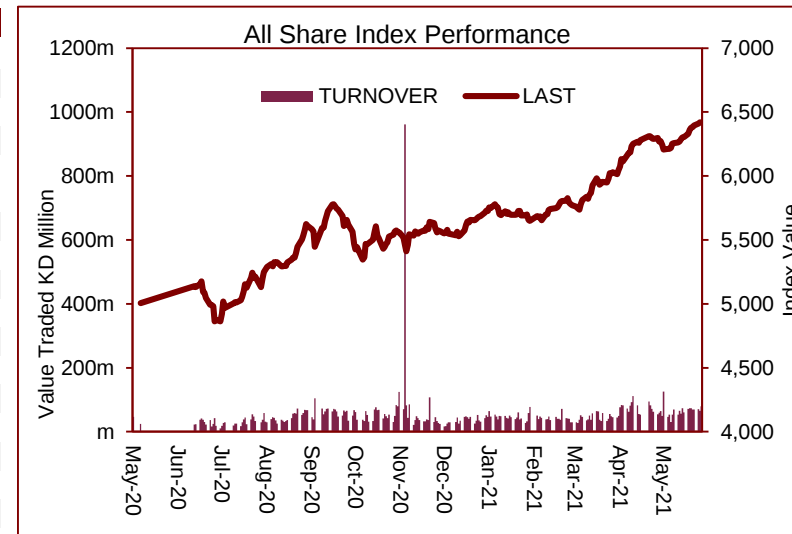
Monday, June 28, 2021



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,477.69	0.20	0.27	4.28	12.13	16.78	38.09 KWD	2.13	34.76
Kuwait Premier Index	7,050.08	0.31	0.48	4.60	11.47	16.51	28.57 KWD	2.30	36.42
Kuwait Main Index	5,356.82	-0.14	-0.25	3.45	14.38	17.76	9.53 KWD	1.63	29.98
NIC 50	7,849.93	0.21	0.43	4.52	11.40	16.51	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,468.74	0.36	0.52	5.74	11.75	16.34	21.63 KWD	1.38	37.42
Telecom	1,091.56	0.86	1.43	0.17	-2.07	-0.98	3.32 KWD	0.62	14.04
Industrials	1,151.05	-0.44	-0.45	2.22	25.00	29.17	4.10 KWD	0.86	14.51
Financial services	1,169.21	0.24	-0.52	3.14	18.71	25.76	3.04 KWD	0.77	10.49
Real estate	1,211.14	-0.80	-0.44	4.45	19.12	27.14	2.63 KWD	0.73	44.16
Basic materials	1,135.68	-0.14	0.52	2.77	4.28	26.38	1.02 KWD	2.00	12.59
Health care	786.56	0.00	0.00	-0.50	-2.92	-4.85	0.39 KWD	4.14	38.42
Consumer services	783.83	-0.39	-1.08	-0.13	10.75	5.02	0.51 KWD	0.94	9.74
Insurance	1,356.88	1.58	0.54	8.74	12.97	17.36	0.51 KWD	0.82	9.20
Consumer Disc	981.36	-0.61	-1.31	3.47	16.06	19.88	0.24 KWD	1.35	8.82
Energy	1,461.80	-1.11	-1.37	4.39	19.30	14.44	0.31 KWD	1.10	14.71
Technology	851.18	0.00	0.00	36.37	42.68	69.32	0.01 KWD	0.99	0.00
Utilities	610.53	0.00	-0.43	-3.33	-13.43	-16.25	0.26 KWD	3.66	20.82

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,957.07	-0.09	0.23	3.73	10.47	25.96	9,723 SAR	2.77	22.15
Qatar (QE Index)	10,679.11	-0.57	-0.73	-0.61	2.71	2.37	550 QAR	1.55	20.36
Dubai (DFMGI)	2,839.97	-1.07	-0.60	1.52	11.36	13.96	316 AED	1.41	11.88
Abu Dhabi (ADI)	6,749.16	0.63	2.63	2.90	14.15	33.77	962 AED	1.82	12.62
Bahrain (BAX)	1,586.38	0.16	0.46	3.85	8.80	6.48	17 BHD	1.25	23.11
MUSCAT SE INDEX	4,057.50	0.31	0.26	5.32	9.40	10.90	5 OMR	0.89	13.25
Developed Markets									
MSCI World Index	3,024.94	0.38	0.00	1.65	7.58	12.45			
U.S. (S&P 500)	4,280.70	0.33	2.74	1.82	7.75	13.97			
U.K. (FTSE 100)	7,115.38	-0.29	-0.28	1.33	5.99	10.14			
Japan (Topix)	1,965.67	0.15	0.15	2.22	0.60	8.92			
Emerging Markets									
MSCI EM Index	1,379.59	0.89	0.00	0.25	4.80	6.84			
China (SSE Composite)	3,606.37	-0.03	-0.03	-0.25	4.78	3.84			
India (Sensex)	52,735.59	-0.36	-0.29	1.61	6.59	10.52			



What Move the GCC markets ,

Oil Prices

Oil prices hit and then recoiled from highs last seen in October 2018 on Monday as investors eyed the outcome of this week's OPEC+ as the United States and Iran wrangle over the revival of a nuclear deal, delaying a surge in Iranian oil exports, Brent crude for August had slipped 19 cents, or 0.25%, to \$75.99 a barrel.

Kuwait Market

The market closed today up by 0.20%, value traded 65.0 million KD, Premier market value traded reached 32.9 million KD and closed at 7,050 change by 0.31 %.

Saudi Market

The Market closed up today by 0.43%, today market Performance is linked to oil prices raised to \$75.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



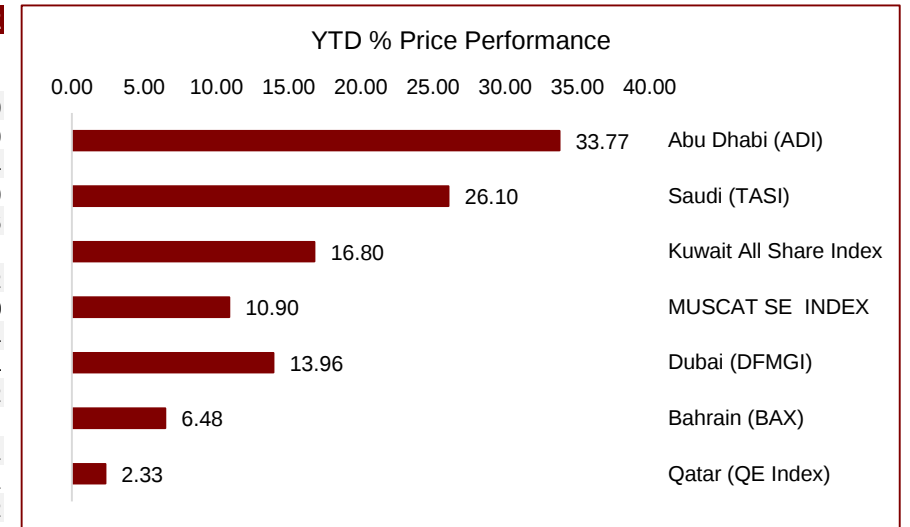
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.862	0.47	0.35	3.86	6.82	7.75	6.17 KWD	1.60	27.00
KFH	0.774	-0.26	-0.13	3.89	10.86	25.76	6.55 KWD	3.48	32.00
Zain	0.597	1.02	1.54	0.00	-1.65	-1.82	2.56 KWD	2.28	14.04
BOUBYAN BANK	0.744	1.22	2.47	11.48	29.82	38.27	2.34 KWD	3.84	34.00
Agility	0.944	-0.63	-0.74	2.72	43.03	53.61	2.12 KWD	1.73	47.16
Saudi Arabia									
ARAMCO	35.10	-0.14	-0.14	-0.57	-2.50	0.29	7,030.19 SAR	6.95	35.12
SABIC	121.20	0.00	0.17	-2.58	3.07	19.33	363.61 SAR	2.12	35.00
STC	130.00	-0.15	-0.92	4.17	2.37	22.45	260.41 SAR	4.00	23.74
AL-RAJHI BANK	111.20	0.36	0.36	7.56	12.35	50.82	277.01 SAR	4.68	23.94
NCB	57.40	-1.03	0.70	8.47	8.47	32.87	259.73 SAR	2.08	14.82
United Arab Emirates									
ETISALAT.AD	22.20	-0.09	0.00	2.49	2.59	31.36	193.24 AED	4.33	21.01
FAB.AD	16.30	0.62	0.25	-3.32	11.64	26.36	176.90 AED	1.72	17.21
EMIRATES NBD	13.55	-1.81	-1.81	-1.81	17.83	31.55	87.17 AED	1.05	13.32
DB ISLAMIC BK	4.83	-1.02	-0.82	1.26	6.15	4.77	35.33 AED	0.98	14.27
EMAAR PROPERT	4.21	-1.64	-0.47	6.58	18.93	19.26	30.64 AED	0.55	12.43
Qatar									
QNB	17.90	-0.83	-1.00	1.13	-0.50	0.39	167.54 QAR	1.80	15.52
INDUSTRIES QAT	13.11	-0.68	-0.76	1.55	9.71	20.61	80.25 QAR	2.40	24.68
QA ISLAMIC BK	17.27	0.58	0.29	-0.69	4.37	0.41	40.77 QAR	1.83	13.88
MASRAF AL RAYA	4.45	-0.02	-0.02	-0.02	3.71	-1.79	33.57 QAR	2.44	15.16
MESAIEED PETRO	1.90	0.21	-0.05	0.90	2.20	-7.13	23.94 QAR	1.52	27.88
OMAN									
BANK MUSCAT	0.420	0.00	-0.47	7.69	9.38	16.67	1.50 OMR	0.75	8.33
OMANTEL	0.788	0.51	0.51	0.00	0.00	8.84	0.59 OMR	1.10	7.69
BANK DHOFAR	0.126	0.00	0.80	10.53	18.87	29.90	0.38 QAR	0.54	14.93
NAT BANK OF OMAN	0.197	-0.51	0.00	18.56	32.00	23.75	0.32 QAR	0.60	12.71
OMINVEST	0.316	1.28	-0.63	-1.25	-1.25	-6.51	0.25 QAR	0.97	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
16-Jun-21	19.92%	12.77%	0.06%	0.43%	0.32%	4.89%	2.59%	10.50%	5.06%	4.11%
23-Jun-21	19.94%	12.60%	0.06%	0.42%	0.33%	4.83%	2.58%	10.55%	5.09%	4.10%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.2 % The leading sector best performance indices today are Telecom 0.86 % Banking 0.36 % Financial services 0.24 % respectively

from YTD performance prespective the best sector performance is Industrials by 29.17 % while the bottom sector performance is Utilities by -16.25 %

Telecommunication sector are up today by + 0.86 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -17.76 %

KSA

Saudi Armco have negative performance today by -0.14 %, SABIC has flat performance today

STC have negative performance today by -0.15 %, Al Rajhi Bank has positive performance today 0.36 %

UAE

ETISALAT AD closed down today by -0.09% , and act defensively with COVID19



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